

# **STATEMENT OF ECONOMIC INTERESTS**



## **ELECTRONIC ROSTER SYSTEM USER GUIDE**

---

## Contents

Introduction .....	3
Getting Started (Log in) .....	4
How to Change Your Password .....	5
Home Page/Dashboard .....	6
Agency Contact .....	7
Editing A Contact Record .....	7 - 9
Roster.....	10
View Roster .....	11 - 12
Update Roster (Add New Filer, Input Leaving Office Date, Edit) .....	13 - 17
Annual Rollover Process .....	18 - 19
View Pending Rosters .....	20
Department Head Certification Form .....	21
Email Notifications .....	22 - 23
Post Forms .....	24 - 25
e-Filers .....	26
Reports.....	27
Documents .....	28 - 31
Need Assistance .....	32

# **Welcome to the Los Angeles County**

## **Statement of Economic Interests**

### **Electronic Roster System**

#### ***(County Related Agencies)***

This user manual is intended to assist all agency Filing Officers/Officials in navigating through the Los Angeles County Statement of Economic Interests Electronic Roster System.

The objective of this system is to provide agency Filing Officers/Officials the ability to review and update their rosters in an interactive, real time environment and to electronically enhance the notification process for Form 700 filers.

This online system will provide the ability to:

- ❖ ***make changes to your agency's roster in real time***
- ❖ ***ensure that Form 700 filers are properly identified and that their information is transmitted to the County in a manner that is more efficient and environmentally-friendly***
- ❖ ***easily obtain an up-to-date, complete filing status of Form 700 filers***
- ❖ ***send out first notifications for Assuming, Leaving and Annual Statements electronically***
- ❖ ***retrieve electronically-filed Form 700 Statements for viewing and printing***
- ❖ ***generate Status Reports***
- ❖ ***upload and store pdf documents related to individual filers***



# Getting Started

**lacounty.gov**  
To Enrich Lives through Effective and Caring Service

**FORM 700 ELECTRONIC FILING SYSTEM**

Welcome to the Los Angeles County  
FORM 700 (SEI) Electronic Filing System  
& COI Roster System

**2016 ANNUAL FORM 700 DEADLINE - FRIDAY, APRIL 1, 2016**

**Log In**

**CALIFORNIA FORM 700**  
FAIR POLITICAL PRACTICES COMMISSION  
A PUBLIC DOCUMENT

**Log In**

User Name:   
Password:

**Log In**

[Forgot User Id/ Password?](#)

**Filing Officer Online Resources**

[Agency Conflict of Interest Codes](#)  
[Filing Officer Info, County](#)  
[Filing Officer Info](#)

**COI Code Amendment Forms**  
[2014 Biennial Review Certification Form](#)  
[How to Review Your COI Code](#)  
[How to Amend Your COI Code](#)  
[Adding a Position](#)  
[Deleting a Position](#)  
[Changing a Position Title](#)  
[Category Disclosure Change](#)  
[Disclosure Change](#)

**What's New**

**Gifts of Travel**  
Effective January 1, 2016, if an individual receives a travel payment that is a reportable gift, he or she must disclose the travel destination. (See the Schedule E instructions for information about other details that must be disclosed.)

**Gifts Limits**  
Gifts received by most state and local officials, employees, and candidates are subject to a limit. For years 2015-2016, the limit is \$460 from a single source during a calendar year.

**Other Resources**

For assistance concerning reporting, prohibitions, and restrictions under the Act:

Call FPPC toll-free at (866)-275-3772  
[www.fppc.ca.gov](http://www.fppc.ca.gov)

Email questions to [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov)

**Related Links:**  
[Reference Pamphlet](#)  
[Limitations and Restrictions Fact Sheet](#)

**"e-Filing supports the environment through paper reduction"**

The Form 700 Electronic Filing System is located at <https://lacform700.lacounty.gov/Login.aspx>

To access the Form 700 Electronic Filing System, you will need a User Name and Password. (If you are a County employee, your User Name is "e" + your County employee number.) Please read the following instructions regarding initial and subsequent entry into the system.

## New User

Your user name and temporary password will be given to you in an email notification. Upon entering this access information, you will be asked to create a new password.

## Already a User?

Once you have created a permanent password, you will be able to access this system at any time. Note that the Conflict of Interest Division will not have knowledge of your permanent password. In the event that you forget your password, you will need to click on "Forgot User Id/Password" to create a new one.

If you are already logged on and wish to change your password, locate the "Change Password" function in the blue title bar next to your name

# Change Password

### Change Password

#### Quick Help

**Password Requirements**

Your Password:

- Must be between 7 - 20 characters
- Must include at least 1 number and 1 letter
- Must contain at least 1 non-alphanumeric character. Example: ! @ # \$
- Can include uppercase and lowercase letters
- Can contain the following character (s): ! @ # %
- Can not contain any spaces
- Can not be the same as your Username.

To change your Online Password, first enter your current Password. Then enter the new Password you want and confirm your choice by reentering the new Password. For your security, your Password must meet several requirements. Please check the Password Requirements area to make sure your Password is sufficiently secure.

#### Change Your Password

1 Password:

2 New Password:

Confirm New Password:

#### Change Your Security Question

3 Security Question:  

4 Security Answer:

5

[Need Assistance?](#)

- 1 Enter the temporary password you received via email or your current password
- 2 Enter a new password which meets the requirements listed above
- 3 Click on the down arrow to choose a security question
- 4 Provide an answer to your question that will be easy for you to remember. (Your answer will not be visible. For security purposes, it will appear on screen with a series of bullets like so "●●●●●●")
- 5 Complete the change password process by clicking on "Change" or cancel the process by clicking on "Cancel"

### Change Password Complete

Your password has been changed!

Once your password has been changed, you will receive a pop up confirmation. Click on  to return to your home page.



**lacounty.gov**  
To Enrich Lives through Effective and Caring Service

**FORM 700 ELECTRONIC FILING SYSTEM**

COI Roster Update System

Welcome, **Mr. Joseph Horvath** [ Change Password ] [ View Profile ] [ Log Out ]

Agency: Regional Planning Department Type: County

Dashboard Agency Contact Roster Post Forms e-Files Reports Documents

Select Dashboard: Filers (EO) Filers

Select Filing Year: 2015

Assuming Office		Leaving Office		Annual Filing	
Status	Count	Status	Count	Status	Count
eFiled	0	eFiled	0	eFiled	0
Pending	0	Pending	0	Pending	0
Received	0	Received	0	Received	1

Count

Status

Count

Status

Count

Status

- 1 After logging in, you should see your name in the blue title bar. You will also find options to change your password, view your profile information and log out of your profile.
- 2 Your agency name should appear in this field. If you are the filing officer or filing official for more than one agency, you can click the down arrow to toggle between agency names.
- 3 This is the Tab Menu. Click on each tab to navigate through various functionalities. Your main page displays a dashboard which keeps count of all your agency filers' Statements of Economic Interests. (Notice that in this view, the "Dashboard" tab has been selected.)
- 4 Select Dashboard – select the type of filer information you wish to view on the dashboard.
  - Selecting **Filers (EO)** will display data regarding only filers of your agency who submit their original Form 700s to the Executive Office of the Board of Supervisors
  - Selecting **Filers** will display data regarding filers of your agency who submit their original Form 700s to you
- 5 Select Filing Year - Click the down arrow to select the year of information you wish to view. You will find that your selected year is defaulted to 2015. As you continue to use the system each year, your profile will build a history of your agency's data and you will be able to toggle between current and prior years
- 6 eFiled - View a count of all Assuming Office, Leaving Office and Annual Statements which have been electronically filed
- 7 Pending - View a count of all Assuming Office, Leaving Office and Annual Statements which have yet to be filed
- 8 Received - View a count of all statements, including hard copy forms you may have posted, which have been received

## Agency Contact

COI Roster Update System Welcome, **Mr. Joseph Horvath** [ Change Password ] [ View Profile ] [ Log Out ]

Agency: Regional Planning Commission Type: County

Dashboard **1** Agency Contact Roster Post Forms e-Files Reports Documents

**2** Agency Information Edit

Regional Planning Commission  
320 West Temple Street, Room B-50 Los Angeles CA 90012  
(213) 974-6677

**Agency Contacts**

<b>3</b> Filing Officer / Official Edit	<b>4</b> Agency Head Edit	<b>5</b> Agency Code Contact Edit
Horvath, Joseph (818) 448-1088 dgarcia@bos.lacounty.gov	Bruckner, Richard (626) 744-4650 RBruckner@planning.lacounty.gov	Horvath, Joseph (818) 448-1088 dgarcia@bos.lacounty.gov

- 1 Click "Agency Contact" to view all contact information for the agency you have selected. (Note: Information on this page is not displayed publicly and is only viewable to the user logged into the account and the Conflict of Interest Administrator.)
- 2 Agency Information - You should see the name of the agency you have selected, its address and your phone number.
- 3 Filing Officer/Official - This information pertains to the filing officer or official of the agency. You should see *your* name, contact phone number and email address.
- 4 Agency Head - This information pertains to the Head (Director, CEO, President, etc.) of your agency. You should see his/her name, contact phone number and email address.
- 5 Agency Code Contact - This information pertains to the person who maintains your agency's Conflict of Interest Code. You should see the person's name, contact phone number and email address.

## Editing a Contact Record

To edit the last name, contact phone number and/or email address of any of your agency's contact records, simply click the "Edit" function.

COI Roster Update System Welcome, **Mr. Joseph Horvath** [ Change Password ] [ View Profile ] [ Log Out ]

Agency: Regional Planning Commission Type: County

Dashboard Agency Contact Roster Post Forms e-Files Reports Documents

Agency Information Edit

Regional Planning Commission  
320 West Temple Street, Room B-50 Los Angeles CA 90012  
(213) 974-6677

**Agency Contacts**

Filing Officer / Official Edit	Agency Head Edit	Agency Code Contact Edit
Horvath, Joseph (818) 448-1088 dgarcia@bos.lacounty.gov	Bruckner, Richard (626) 744-4650 RBruckner@planning.lacounty.gov	Horvath, Joseph (818) 448-1088 dgarcia@bos.lacounty.gov

## Edit Agency Contact Record - Step One

Click  to open the contact record you wish to make changes to.

The screenshot shows the 'COI Roster Update System' interface. At the top, it says 'Welcome, Mr. Joseph Horvath' with links for 'Change Password', 'View Profile', and 'Log Out'. The 'Agency' dropdown is set to 'Regional Planning Commission' and the 'Type' is 'County'. A navigation bar includes 'Dashboard', 'Agency Contact', 'Roster', 'Post Forms', 'e-Files', 'Reports', and 'Documents'. The 'Agency Information' section shows the agency name and address. The 'Agency Contacts' section has three columns: 'Filing Officer / Official' (with an 'Edit' button circled in red), 'Agency Head', and 'Agency Code Contact'. Each column lists contact details for Joseph Horvath and Richard Bruckner.

## Edit Agency Contact Record - Step Two

Each field of information that can be changed will appear in edit mode. Once you have made your change, click on . To exit this feature without making changes, click on .

Two side-by-side screenshots of the 'Agency Contacts' edit form. The left screenshot, labeled with a circled '1', shows the form with fields for Last Name (Horvath), First Name (Joseph), Phone ((818) 448-1088), and Email (dgarcia@bos.lacounty.gov), with 'Update' and 'Cancel' buttons at the bottom. The right screenshot, labeled with a circled '2', shows the same form but with the 'Update' button circled in red.

## Edit Agency Contact Record - Step Three

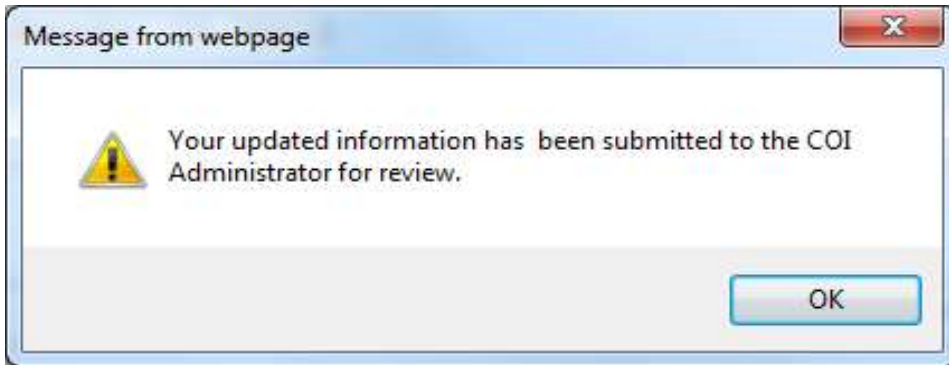
Click  to confirm that you, the authorized user on this account, are submitting accurate changes to this record. This action constitutes your electronic signature.

A confirmation dialog box titled 'Message from webpage' with a question mark icon. The text inside reads: 'I confirm that I am the authorized user on this account and that the changes I am submitting are true and correct. By clicking the "OK" button, I am providing my electronic signature.' At the bottom are 'OK' and 'Cancel' buttons.



## Edit Agency Contact Record - Step Four

You should receive a pop-up confirming that your edited information has been submitted to the COI Administrator for review. Click "OK" to confirm that you have read this notification.



## Edit Agency Contact Record - Step Five

Notice that your contact record is in a "Pending" status to reflect that your edits have been submitted to the COI Administrator and are pending approval.

Agency Contacts		
Filing Officer / Official <span>Pending</span>	Agency Head <span>Edit</span>	Agency Code Contact <span>Pending</span>
Horvath, Joseph (818) 448-1088 dgarcia@bos.lacounty.gov	Bruckner, Richard (626) 744-4650 RBruckner@planning.lacounty.gov	Horvath, Joseph (818) 448-1088 dgarcia@bos.lacounty.gov

## Edit Agency Contact Record - Step Six

To confirm that your changes were made, simply log back in and view your contact record. Please allow 1 – 2 business days for your contact record to be updated.

Agency Contacts		
Filing Officer / Official <span>Edit</span>	Agency Head <span>Edit</span>	Agency Code Contact <span>Edit</span>
Horvath, Joseph (818) 448-1088 jhorvath@bos.lacounty.gov	Bruckner, Richard (626) 744-4650 RBruckner@planning.lacounty.gov	Horvath, Joseph (818) 448-1088 jhorvath@bos.lacounty.gov

## Roster

"Roster" refers to your department's list of persons whose position requires them to file a Statement of Economic Interests (Form 700).

Agency: Board of Supervisors - Assessment Appeals Hearing Officers

Type: County

Dashboard
Agency Contact
Roster
Post Forms
e-Filers
Reports
Documents
Submit Form 700

1 Select Filing Year: 2015
2 Select Roster you Wish to View: ☒ Filers (EO) ☐ Filers  
[Department Head Certification Form](#)  
☐ OK for Annual Rollover Process

3 View Roster
4 Update Roster
5 View Pending Rosters

Last Name	First Name	Position	Category	Division	County Emp.	Email	AO Date	LO Date
<input type="text"/>	<input type="text"/>	<input type="text"/>				<input type="text"/>		
Aikens	Debra	Assessment Hearing Officer	1, 2, 3		Yes	keldeb@sbcglobal.net	10/24/08	
Allen	Annina	Assessment Hearing Officer	1, 2, 3		Yes	nallenrea@hotmail.com	10/24/08	
Earnest	Matt	Assessment Hearing Officer	1, 2, 3		Yes	rambleinla@yahoo.com	10/24/08	
Evans-Graham	Mona	Assessment Hearing Officer	1, 2, 3		Yes	mona.graham@yahoo.com	10/24/08	

- 1 Select Filing Year - Click the down arrow to select the year of information you wish to view. You will find that your selected year is defaulted to 2015. As you continue to use the system each year, your profile will build a history of your agency's data and you will be able to toggle between current and prior years.
- 2 Select Roster you Wish to View – select which list of filers you wish to view
  - Selecting **Filers (EO)** will display a list of only those filers of your agency who submit their original Form 700s to the Executive Office of the Board of Supervisors
  - Selecting **Filers** will display a list of filers in your agency who submit their original Form 700s to you
- 3 View Roster - Click this tab to view the names and affiliated information of all persons who are required to file the Form 700.
- 4 Update Roster – Click this tab to edit the individual information of each of your agency's filers
- 5 View Pending Rosters – Click this tab to view all recently submitted changes to your roster which are pending COI Administrator approval

## View Roster

This page provides you with a complete list of persons who are or who have been Form 700 Filers (for whom you are the Filing Officer) and Executive Office Form 700 Filers (filers for whom the Executive Office is the Filing Officer) at any time during the filing year selected.

**Note: The Assuming Office date for your existing (Filers) has been defaulted to 9/30/15. This Assuming Office date does not require correction. Going forward, the Assuming Office date for new filers will be accurately reflected.**

**Agency: Board of Supervisors - Assessment Appeals Hearing Officers****Type: County**

Dashboard Agency Contact **Roster** Post Forms e-Filers Reports Documents Submit Form 700

Select Filing Year: 2015

Select Roster you Wish to View: ☐ Filers (EO) ☒ Filers

[Department Head Certification Form](#)

☐ OK for Annual Rollover Process

View Roster Update Roster View Pending Rosters

Last Name	First Name	Position	Category	Division	County Emp.	Email	AO Date	LO Date
<input type="text"/>	<input type="text"/>	<input type="text"/>				<input type="text"/>		
Testor	John	Position Testor	1, 2		No	dgarcia@bos.lacounty.gov	12/16/15	11/19/15
Total Filer:1								

**Agency: Board of Supervisors - Assessment Appeals Hearing Officers****Type: County**

Dashboard Agency Contact **Roster** Post Forms e-Filers Reports Documents Submit Form 700

Select Filing Year: 2015

Select Roster you Wish to View: ☒ Filers (EO) ☐ Filers

[Department Head Certification Form](#)

☐ OK for Annual Rollover Process

View Roster Update Roster View Pending Rosters

Last Name	First Name	Position	Category	Division	County Emp.	Email	AO Date	LO Date
<input type="text"/>	<input type="text"/>	<input type="text"/>				<input type="text"/>		
Aikens	Debra	Assessment Hearing Officer	1, 2, 3		Yes	keldeb@sbcglobal.net	10/24/08	
Allen	Annina	Assessment Hearing Officer	1, 2, 3		Yes	nallenrea@hotmail.com	10/24/08	

You can sort, filter, and export your filer data by filing year, the filer's name, position or County Employment status.

**1 Select Filing Year:** 2015

**Select Roster you Wish to View:** ☒ Filers (EO) ☐ Filers

[Department Head Certification Form](#)

☐ OK for Annual Rollover Process

**2** View Roster Update Roster View Pending Rosters

Last Name	First Name	Position	Category	Division	County Emp.	Email	AO Date	LO Date
<input type="text"/>	<input type="text"/>	<input type="text"/>				<input type="text"/>		
Aikens	Debra	Assessment Hearing Officer	1, 2, 3		Yes	keldeb@sbcglobal.net	10/24/08	
Allen	Annina	Assessment Hearing Officer	1, 2, 3		Yes	nallenrea@hotmail.com	10/24/08	
Earnest	Matt	Assessment Hearing Officer	1, 2, 3		Yes	rambleinla@yahoo.com	10/24/08	
Evans-Graham	Mona	Assessment Hearing Officer	1, 2, 3		Yes	mona.graham@yahoo.com	10/24/08	
Fredericks	Derf	Assessment Hearing Officer	1, 2, 3		Yes	derf@flash.net	04/27/94	

**3**

- 1** Select Filing Year – Choose the down arrow to toggle between years.
- 2** Column Headings – Click on each column heading to sort (by first name, last name, position title, County Employee status, etc.)
- 3** Click on the filter icon to search for filers based on specific criteria
- 4** Use this function to export all your data into an Excel spreadsheet, including column headings

## Update Roster

This page allows you to add a new filer when a filer has assumed office, or input a Leaving Office Date when a filer has left office. You may also edit your existing filers' information.

### Update Roster - Add New Filer

To add a new filer, click on the "Update Roster" tab and complete the following steps...

### Add New Filer - Step One

Click on the green plus sign next to "Add New Filer".

**Agency: Board of Supervisors - Assessment Appeals Hearing Officers** **Type: County**

Dashboard Agency Contact **Roster** Post Forms e-Filers Reports Documents Submit Form 700

**Select Roster you Wish to View:** ☒ Filers (EO) ☐ Filers  
[Department Head Certification Form](#)

☐ OK for Annual Rollover Process


View Roster **Update Roster** View Pending Rosters

 Add New Filer

Last Name	First Name	Position	Category	Division	County Emp.	Email	AO Date	
<input type="text"/>	<input type="text"/>	<input type="text"/>				<input type="text"/>		
Aikens	Debra	Assessment Hearing Officer	1, 2, 3		Yes	keldeb@sbcglobal.net	10/24/08	Edit
Allen	Annina	Assessment Hearing Officer	1, 2, 3		Yes	nallenrea@hotmail.com	10/24/08	Edit
Earnest	Matt	Assessment Hearing Officer	1, 2, 3		Yes	rambleinla@yahoo.com	10/24/08	Edit
Evans-Graham	Mona	Assessment Hearing Officer	1, 2, 3		Yes	mona.graham@yahoo.com	10/24/08	Edit
Fredericks	Derf	Assessment Hearing Officer	1, 2, 3		Yes	derf@flash.net	04/27/94	Edit

A new window with required fields will appear.

View Roster **Update Roster** View Pending Rosters

 Add New Filer

Last Name	First Name	Position	Category	Division	County Emp.	Email	AO Date	LO Date
<div>Assuming Office Date <input type="text"/></div> <div>Leaving Office Date <input type="text"/></div> <div>First Name <input type="text"/></div> <div>Designated Position <input type="text"/></div> <div>Middle Name <input type="text"/></div> <div>Acting Position <input type="checkbox"/></div> <div>Last Name <input type="text"/></div> <div>Disclosure Category <input type="text"/></div> <div>Email Address <input type="text"/></div> <div>Division <input type="text"/></div> <div>County Employee <input type="checkbox"/> Yes <input type="checkbox"/> No</div> <div>Employee Number <input type="text"/></div> <div><input type="button" value="Submit Roster update"/> <input type="button" value="Cancel"/></div>								



## Add New Filer - Step Two

Complete the following fields to add a new filer:

View Roster | Update Roster | View Pending Rosters

+ Add New Filer Refresh

Last Name	First Name	Position	Category	Division	County Emp.	Email	AO Date	LO Date
Assuming Office Date	①			Leaving Office Date				
First Name	②			Designated Position				
Middle Name	③			Acting Position	⑨			
Last Name	④			Disclosure Category				
Email Address	⑤			Division	*			
County Employee	⑥	<input type="checkbox"/> Yes <input type="checkbox"/> No						
Employee Number	⑦							

⑩ Submit Roster update Cancel

- ① Provide the filer's assuming Office Date
  - ② Enter the filer's First Name.
  - ③ Enter the filer's Middle Name or Initial (if available).
  - ④ Enter the filer's Last Name.
  - ⑤ Enter the filer's full email address. (Please ensure that the email is current and functioning.)
  - ⑥ Check the appropriate box to indicate whether or not the filer is a County Employee
  - ⑦ If the filer is a County employee, please enter "e" and their six digit employee number (e.g. e123456). If the filer is not a County employee, leave this blank.
  - ⑧ Click the down arrow to choose the designated position of the filer from the drop down menu. (The disclosure categories for this designated position will automatically generate in the "Disclosure Category" field.)
  - ⑨ Check the box if the filer is occupying an "acting" or interim position
  - ⑩ Click **Submit Roster update.** to submit this data to the COI Administrator for approval.
- \* The Division field is an optional function which you can use to categorize your filers.

## Update Roster .

Edit

To edit information or to input a Leaving Office Date, click on the “Edit” function.

View Roster    Update Roster    View Pending Rosters									
Add New Filer								Refresh	
Last Name	First Name	Position	Category	Division	County Emp.	Email	AO Date	LO Date	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Anderson	Jane	Member, School Board	1, 2, 3		No	Anderson_Jane@ausd.us	01/09/07		Edit
Andrade-Stadler	Adele	Member, School Board	1, 2, 3		No	Andrade-Stadler_Adele@ausd.us	12/07/04		Edit

## Edit - Step One

View Roster    Update Roster    View Pending Rosters									
Add New Filer								Refresh	
Last Name	First Name	Position	Category	Division	County Emp.	Email	AO Date	LO Date	
Anderson	Jane	Member, School Board	1, 2, 3		No	Anderson_Jane@ausd.us	01/09/07		Edit
Andrade-Stadler	Adele	Member, School Board	1, 2, 3		No	Andrade-Stadler_Adele@ausd.us	12/07/04		Edit

Assuming Office Date	<input type="text" value="12/7/2004"/>	Leaving Office Date	<input type="text"/>
First Name	<input type="text" value="Adele"/>	Designated Position	<input type="text" value="Member, School Board"/>
Middle Name	<input type="text" value="E"/>	Acting Position	<input type="checkbox"/>
Last Name	<input type="text" value="Andrade-Stadler"/>	Disclosure Category	<input type="text" value="1, 2, 3"/>
Email Address	<input type="text" value="Andrade-Stadler_Adele@ausd.us"/>	Division	<input type="text"/>
County Employee	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Employee Number	<input type="text" value="N000021"/>		

Submit Roster update.    Cancel

Type the updated information in the appropriate field and/or select the Leaving Office Date by using the calendar icon (if applicable). Then, click **Submit Roster update.** to submit your changes to the COI Administrator for approval.

Andrade-Stadler	Adele	Member, School Board	1, 2, 3	No	Andrade-Stadler_Adele@ausd.us	12/07/04	Edit
-----------------	-------	----------------------	---------	----	-------------------------------	----------	------

Assuming Office Date	<input type="text" value="12/7/2004"/>	Leaving Office Date	<input type="text"/>
First Name	<input type="text" value="Adele"/>	Designated Position	<input type="text" value="Member, School Board"/>
Middle Name	<input type="text" value="E"/>	Acting Position	<input type="checkbox"/>
Last Name	<input type="text" value="Stadler"/>	Disclosure Category	<input type="text" value="1, 2, 3"/>
Email Address	<input type="text" value="Andrade-Stadler_Adele@ausd.us"/>	Division	<input type="text"/>
County Employee	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Employee Number	<input type="text" value="N000021"/>		

Submit Roster update.    Cancel

(In this scenario, the filer’s last name has been changed from “Andrade-Stadler” to “Stadler”)

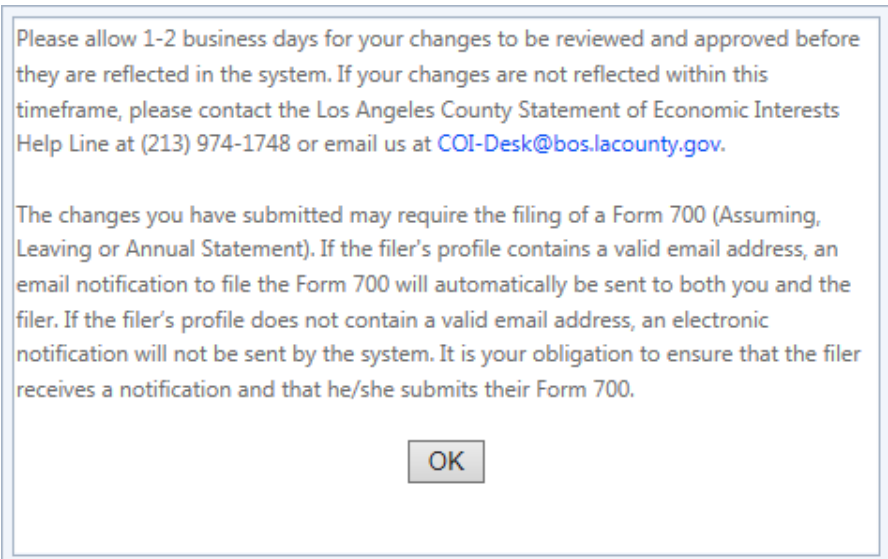
**Edit - Step Two**

Click  to confirm that you, the authorized user on this account, are submitting true and accurate changes to this record. This action constitutes your electronic signature.



**Edit - Step Three**

Click  to confirm that you have read the terms and conditions that determine the approval of your edits.



**Edit - Step Four**

Notice that the status of your filer is no longer in Edit mode. The status has changed to “pending” to reflect that your edits have been submitted to the COI Administrator and are pending approval.

View Roster    Update Roster    View Pending Rosters							
<div><div><div><div><div></div><div>Add New Filer</div></div></div><div><div></div><div>Refresh</div></div></div></div>							
Last Name	First Name	Position	Category	Division	County Emp.	Email	AO Date
<input type="text"/>	<input type="text"/>	<input type="text"/>				<input type="text"/>	
Anderson	Jane	Member, School Board	1, 2, 3		No	Anderson_Jane@ausd.us	01/09/07
Andrade-Stadler	Adele	Member, School Board	1, 2, 3		No	Andrade-Stadler_Adele@ausd.us	12/07/04
Gin	Robert	Member, School Board	1, 2, 3		No	Gin_Bob@ausd.us	12/02/02

## Edit - Step Five

Once the COI Administrator has approved your edits, confirm that your changes were made by clicking on “View Roster”.

View Roster		Update Roster		View Pending Rosters					
Last Name	First Name	Position	Category	Division	County Emp.	Email	AO Date	LO Date	
<input type="text"/>	<input type="text"/>	<input type="text"/>				<input type="text"/>			
Anderson	Jane	Member, School Board	1, 2, 3		No	Anderson_Jane@ausd.us	01/09/07		
Gin	Robert	Member, School Board	1, 2, 3		No	Gin_Bob@ausd.us	12/02/02		
Rodriguez-Mackintosh	Patricia	Member, School Board	1, 2, 3		No	Rodriguez-Mackintosh_Pat@ausd.us	12/07/04		
Russell-Chavez	Joanne	Member, School Board	1, 2, 3		No		12/09/14		
Stadler	Adele	Member, School Board	1, 2, 3		No	Andrade-Stadler_Adele@ausd.us	12/07/04		
Tellez-Gagliano	Laura	Superintendent	1, 2, 3		No	tellez_laura@ausd.us	09/01/12		
Total Filer:6									

[Export to Excel](#)

You will also notice that the status of your filer is no longer in Pending mode when you go to “Update Roster”.

View Roster		Update Roster		View Pending Rosters					
Last Name	First Name	Position	Category	Division	County Emp.	Email	AO Date		
<input type="text"/>	<input type="text"/>	<input type="text"/>				<input type="text"/>			
Anderson	Jane	Member, School Board	1, 2, 3		No	Anderson_Jane@ausd.us	01/09/07	Edit	
Gin	Robert	Member, School Board	1, 2, 3		No	Gin_Bob@ausd.us	12/02/02	Edit	
Rodriguez-Mackintosh	Patricia	Member, School Board	1, 2, 3		No	Rodriguez-Mackintosh_Pat@ausd.us	12/07/04	Edit	
Russell-Chavez	Joanne	Member, School Board	1, 2, 3		No		12/09/14	Edit	
Stadler	Adele	Member, School Board	1, 2, 3		No	Andrade-Stadler_Adele@ausd.us	12/07/04	Edit	
Tellez-Gagliano	Laura	Superintendent	1, 2, 3		No	tellez_laura@ausd.us	09/01/12	Edit	
Total Filer:6									

[Export to Excel](#)

## Annual Rollover

The electronic process for annual rollover is equivalent to the manual process involving annual roster updates. Normally, hard copy rosters are mailed to each filing officer at the end of the year, requiring the updating and approval of the agency's roster for the next year. Via the online system, Roster changes can now be made throughout the year as changes occur.

Once you have reviewed your online roster and it reflects the most accurate information for your agency, you can go to the "Update Roster" page and provide your approval to begin the Annual Rollover Process. **(Note: This functionality will only be available to you once a year. You will receive notification from the COI Administrator as to when you should begin the rollover process.)**

### Annual Rollover - Step One

Go to "Update Roster". Upon reviewing your agency's roster, if you agree that all the filers listed are active and should be rolled over to the next filing year, check the box next to "OK for Annual Rollover Process" and click

Last Name	First Name	Position	Category	Division	County Emp.	Email	AO Date	Edit
Bruesch	Robert	Member of the Board of Education	1, 2, 3		No	bobbbruesch@charter.net	12/10/03	Edit
Chin	Maureen	Member of the Board of Education	1, 2, 3		No	mreenc@hotmail.com	12/12/13	Edit
Chu	Anita	Superintendent	1, 2, 3		No	achu@garvey.k12.ca.us	11/01/14	Edit
Lo	Henry	Member of the Board of Education	1, 2, 3		No	generasian_xer@yahoo.com	12/10/03	Edit
Meng	Keilley	Member of the Board of Education	1, 2, 3		No	Kmeng@garvey.k12.ca.us	12/10/15	Edit
Trabanino	Ronald	Member of the Board of Education	1, 2, 3		No	trabaninoronald@gmail.com	12/12/13	Edit

Total Filers: 6

### Annual Rollover - Step Two

Click  to confirm that you, the authorized user on this account, have reviewed your agency's roster and are submitting it to the COI Administrator so that the listed filers can roll over to the next filing year.

Message from webpage

?

I confirm that I have reviewed my agency's roster and acknowledge that it accurately reflects only active filers in my agency who should be rolled over to the next filing year.

OK Cancel



## Annual Rollover - Step Three

Once your Roster has been submitted to the COI Administrator, the “Submit” button will be replaced with a grayed-out button that reads:

Annual Rollover is pending COI Administrator approval

Dashboard Agency Contact **Roster** e-Filers Reports Documents

☒ OK for Annual Rollover Process Annual Rollover is pending COI Administrator approval

View Roster Update Roster View Pending Rosters

Add New Filer Refresh

Last Name	First Name	Position	Category	Division	County Emp.	Email	AO Date
<input type="text"/>	<input type="text"/>	<input type="text"/>				<input type="text"/>	

## Annual Rollover - Step Four

The COI Administrator will review and confirm your submittal, creating different roster views for the new filing year. (Please allow up to 7 business days to be able to view your new roster.) You will notice that your roster view has defaulted to the new filing year and the option for the Annual Rollover Process has disappeared.

User Management Pending Updates ▼ Dashboard Agency Contact **Roster** e-Filers Reports Documents Submit Form 700

Select Filing Year: 2016 ▼

View Roster Update Roster View Pending Rosters

Last Name	First Name	Position	Category	Division	County Emp.	Email	AO Date	LO Date
<input type="text"/>	<input type="text"/>	<input type="text"/>				<input type="text"/>		
Bruesch	Robert	Member of the Board of Education	1, 2, 3		No	bobbruesch@charter.net	12/10/03	
Chin	Maureen	Member of the Board of Education	1, 2, 3		No	mreenc@hotmail.com	12/12/13	
Chu	Anita	Superintendent	1, 2, 3		No	achu@garvey.k12.ca.us	11/01/14	
Lo	Henry	Member of the Board of Education	1, 2, 3		No	generasian_xer@yahoo.com	12/10/03	
Meng	Keilley	Member of the Board of Education	1, 2, 3		No	Kmeng@garvey.k12.ca.us	12/10/15	
Trabanino	Ronald	Member of the Board of Education	1, 2, 3		No	trabaninoronald@gmail.com	12/12/13	
Total Filer:6								

Export to Excel

## View Pending Rosters

View Roster		Update Roster		View Pending Rosters					
Last Name	First Name	Position	Category	Division	County Emp.	Email	AO Date	LO Date	
<input type="text"/>	<input type="text"/>	<input type="text"/>				<input type="text"/>			
Rodriguez-Mackintosh	Patricia	Member, School Board	1, 2, 3		No	Rodriguez-Mackintosh_Pat@ausd.us	12/07/04		Cancel
Russell-Chavez	Joanne	Member, School Board	1, 2, 3		No		12/09/14		Cancel
Stadler	Adele	Member, School Board	1, 2, 3		No	Andrade-Stadler_Adele@ausd.us	12/07/04		Cancel
Tellez-Gagliano	Laura	Superintendent	1, 2, 3		No	tellez_laura@ausd.us	09/01/12	12/04/15	Cancel
Total Filer:4									
<a href="#">Export to Excel</a>									

If you submitted changes through the “Update Roster” function, that information will appear here until the COI Administrator approves the changes. Once these changes have been approved by the COI Administrator, they will no longer appear on “View Pending Rosters” page. You can then go to your “View Roster” tab to see your updated roster.

To cancel any newly submitted edits that have not yet been approved by the COI Administrator, click on “Cancel”. Note: these changes will not reach the COI Administrator for approval.

## Department Head Certification Form

The Department Head Certification Form is used to reflect your department's filers' Annual Form 700 filing status as of each year's April 1<sup>st</sup> deadline. It is collected annually from your department and should be signed by your Department Head as acknowledgement that he/she is aware of your department's filers' filing status. Via this online system, the names of your department's filers who have not yet filed their Statements of Economic Interests will be automatically prepopulated onto the form.

Agency: Board of Supervisors - Assessment Appeals Hearing Officers Type: County

Dashboard Agency Contact **Roster** Post Forms e-Filers Reports Documents Submit Form 700

Select Filing Year: 2015

Select Roster you Wish to View: ☐ Filers (EO) ☒ Filers

**Department Head Certification Form**

☐ OK for Annual Rollover Process

View Roster		Update Roster		View Pending Rosters				
Last Name	First Name	Position	Category	Division	County Emp.	Email	AO Date	LO Date
<input type="text"/>	<input type="text"/>	<input type="text"/>				<input type="text"/>		
Testor	John	Position Testor	1, 2		No	dgarcia@bos.lacounty.gov	12/16/15	11/19/15
Total Filer:1								

To generate the Department Head Certification Form for your agency, simply click on the link.

**2015/2016 DEPARTMENT HEAD CERTIFICATION FORM**  
FOR STATEMENT OF ECONOMIC INTERESTS

To: Patrick Oyama, Acting Executive Officer  
Board of Supervisors

From: Submitted Your Name Here

Subject: Certification of Completion of the Annual Filing of Statements of Economic Interests (Form 700)

Date: Signature Here

I have received the Statements of Economic Interests (Form 700) for employees who hold assessment positions reflected in Section "B" of our Department's Certificate of Interest and Disclosure Cards, posted to internet website.

Signature Here Date

Statements of Economic Interests have not been received for the following employees (attach as Exhibit to your Certification):

Employee Name	Designated Position	Reason

Please send your completed Certification Form to the following address:  
Attn: County of Interest, County Clerk  
Assessment Office, Board of Supervisors  
100 W. Temple Street, Room 300  
Los Angeles, CA 90012

You may or may not have filers listed. If all of your agency's filers submitted their Annual Statement by the April 1<sup>st</sup> deadline, the bottom portion of the form will be blank. However, if you have any filers in your agency at the time that this form is generated, who have not yet filed their Annual Statement, you should see their name and designated position. In this case, you should print the form and provide a reason as to why their Annual Statement was not submitted.

Once your form is completed and signed by your Department Head, you can email it to [COI-Desk@bos.lacounty.gov](mailto:COI-Desk@bos.lacounty.gov) or mail the original to the address on the bottom of the form.

## Email Notifications

Once a new filer profile has been created, if the filer's profile contains a valid email address, an automatic email notification will be sent from the COI-Desk to both you and the new filer advising him or her to submit an Assuming Office Statement. **(Note: This feature will be activated after the 2016 Annual Filing Period.)**

From:	COI-Desk@bos.lacounty.gov
To:	Filer
Cc:	Filing officer/official
Bcc:	
Subject:	FORM 700 ASSUMING OFFICE STATEMENT DUE (INITIAL NOTIFICATION)

**WELCOME TO THE NEWLY ENHANCED E-FILING SYSTEM FOR FORM 700**


**(Filer Name):**

Our records indicate that you assumed a position with **Agency Name** on **Assuming Office Date** which requires you to file an Assuming Office Statement of Economic Interests (Form 700).

You may file your Form 700 electronically, using the Los Angeles County E-Filing System. **(Your log on information will be sent to you in a separate email unless you have entered our system and created a password for a previous filing.)** However, should you choose to file your Form 700 by hard copy, you will need to contact your agency's filing officer to obtain a blank form and your disclosure requirements.

The reporting period covered by this filing must encompass the 12 months prior to the date you assumed office. The deadline for submitting your Form 700 is **Due Date**. Failure to file by the due date may subject you to late filing fees.

Should you require assistance with your disclosure requirements, please contact your Filing Officer/Official, **(Name of Filing Officer/Official)** at **(Filing Officer/Official Contact #)**.

 e-Filing supports the environment through paper reduction

The filer will receive a separate email containing his/her log in information.

From:	COI-Desk@bos.lacounty.gov
To:	Filer
Cc:	
Bcc:	
Subject:	FORM 700 ASSUMING OFFICE STATEMENT (LOGIN INFORMATION)

**WELCOME TO THE NEWLY ENHANCED E-FILING SYSTEM FOR FORM 700**

**(Filer Name):**

Our records indicate that you assumed a position with **Agency Name** which requires you to file an Assuming Office Statement of Economic Interests (Form 700).


To file your Form 700 electronically, via the Los Angeles County E-Filing System, simply click this link: <https://lacform700.lacounty.gov> and log on using the information below:

**CALIFORNIA FORM 700**  
FOR POLITICAL PRACTICES COMMISSION  
A PUBLIC DOCUMENT

**USERNAME:** XXXXXXXX

**TEMPORARY PASSWORD:** XXXXXXXX

For questions regarding the e-filing system, please contact us at (213) 974-1748 or [COI-Desk@bos.lacounty.gov](mailto:COI-Desk@bos.lacounty.gov).

 e-Filing supports the environment through paper reduction

Upon the submission of a leaving office date, if the filer's profile contains a valid email address, an automatic email notification will be sent to both you and the filer, advising him or her to submit a Leaving Office Statement.


From:	COI-Desk@bos.lacounty.gov
To:	filer
Cc:	filing officer/official
Bcc:	
Subject:	FORM 700 LEAVING OFFICE STATEMENT DUE (INITIAL NOTIFICATION)

**(Filer Name):**

Our records indicate that you left your position with **Agency Name** on **Leaving Office Date** which requires you to file a Leaving Office Statement of Economic Interests (Form 700). The deadline for submitting your Form 700 is **Due Date**.

You may file your Form 700 electronically, using the Los Angeles County E-Filing System. **(Your log on information will be sent to you in a separate email unless you have entered our system and created a password for a previous filing.)** However, should you choose to file your Form 700 by hard copy, you will need to contact your agency's filing officer to obtain a blank form and your disclosure requirements.

Should you require assistance with your disclosure requirements, please contact your Filing Officer/Official, **(Name of Filing Officer/Official)** at **(Filing Officer/Official Contact #)**.

 e-Filing supports the environment through paper reduction


If this is the first time the filer is using the online system, he/she will receive a separate email containing his/her log in information.

From:	COI-Desk@bos.lacounty.gov
To:	filer
Cc:	
Bcc:	
Subject:	FORM 700 LEAVING OFFICE STATEMENT (LOGIN INFORMATION)

**(Filer Name):**

Our records indicate that you left your position with **Agency Name** on **Leaving Office Date** which requires you to file a Leaving Office Statement of Economic Interests (Form 700). The deadline for submitting your Form 700 is **Due Date**.


To file your Form 700 electronically, via the Los Angeles County E-Filing System, simply click this link:  
<https://lacform700.lacounty.gov> and log on using the information below:



**USERNAME:** XXXXXXXX

**TEMPORARY PASSWORD:** XXXXXXXX

For questions regarding the e-filing system, please contact us at (213) 974-1748 or [COI-Desk@bos.lacounty.gov](mailto:COI-Desk@bos.lacounty.gov).

 e-Filing supports the environment through paper reduction



## Post Forms

The Post Forms section allows you to record the receipt of the **hard copy** forms you receive from your agency's filers. However, please note that if filers submit their Form 700 electronically, you will not be able to post a hard copy version here, as their SEI record will have already been received and will automatically change their filing status to "Received".

Note that you will not be able to post EO Filers, since their filings are the responsibility of the Executive Office. (Hard copy forms submitted to you by EO Filers should be forwarded to the Executive Office of the Board of Supervisors.)

### Post Forms - Step One

Select the "Post Forms" tab and click the type of Statement of Economic Interests (SEI) you would like to post.

Agency: Board of Supervisors - Assessment Appeals Hearing Officers Type: County

Dashboard Agency Contact Roster **Post Forms** e-Filers Reports Documents Submit Form 700

Type of SEI: ☐ Annual ☐ Assuming ☒ Leaving

Filing Received Date:

Form-700		Amendment						
Last Name	First Name	Position	County Emp.	Division	AO Date	LO Date	Status	Select
▶ Testor	John	Position Testor	No		12/17/15	11/19/15	Pending	<input type="checkbox"/>

### Post Forms - Step Two

Locate your agency's filings in the grid and select the one you want by checking the box at the end of the record.

Type of SEI: ☐ Annual ☐ Assuming ☒ Leaving

Filing Received Date:

Form-700		Amendment						
Last Name	First Name	Position	County Emp.	Division	AO Date	LO Date	Status	Select
▶ Testor	John	Position Testor	No		12/17/15	11/19/15	Pending	<input checked="" type="checkbox"/>

If you have more than one filing to post at a time, and all your filings were received on the same date, you can use the "Select All" function to select all your filings and post them at the same time.

Type of SEI: ☐ Annual ☐ Assuming ☒ Leaving

Filing Received Date:

Form-700		Amendment						
Last Name	First Name	Position	County Emp.	Division	AO Date	LO Date	Status	Select
▶ Testor	John	Position Testor	No		12/17/15	11/19/15	Pending	<input checked="" type="checkbox"/>

## Post Forms - Step Three

Using the calendar icon, select the "Filing Received Date"

Dashboard Agency Contact Roster **Post Forms** e-Filers Reports Documents Submit Form 700

Type of SEI: ☐ Annual ☐ Assuming ☒ Leaving

Filing Received Date:   Update Clear All Select All

Form-700

	5	M	T	W	T	F	S
1	27	28	29	30	31	1	2
2	3	4	5	6	7	8	9
3	10	11	12	13	14	15	16
4	17	18	19	20	21	22	23
5	24	25	26	27	28	29	30
6	31	1	2	3	4	5	6


Last Name	County Emp.	Division	AO Date	LO Date	Status	Select
Testor	No		12/17/15	11/19/15	Pending	<input checked="" type="checkbox"/>

## Post Forms - Step Four

Using the calendar icon, select the "Filing Received Date"

Dashboard Agency Contact Roster **Post Forms** e-Filers Reports Documents Submit Form 700

Type of SEI: ☐ Annual ☐ Assuming ☒ Leaving

Filing Received Date:   **Update** Clear All Select All

Form-700 Amendment

Last Name	First Name	Position	County Emp.	Division	AO Date	LO Date	Status	Select
Testor	John	Position Testor	No		12/17/15	11/19/15	Pending	<input checked="" type="checkbox"/>

## e-Filers

This section will provide you with a list of all filers in your agency who have filed their Form 700 electronically.

**1** Select Filing Year: 2015

Last Name	First Name	MI	EmployeeNumber
Greenstein	Jay	D	
Koretz	Paul		N001119
Sahli-Wells	Meghan	Gwethalyn	
Westall	Andrew	J	

Total Filers: 4

- 1** Select Filing Year – Choose the down arrow to toggle between years.
- 2** Column Headings – Click on each column heading to sort alphabetically by first name or last name
- 3** Click on the arrow next to a filer’s name if you wish to view a list of their electronically filed statements for the year selected.

Select Filing Year: 2015

Last Name	First Name	MI	EmployeeNumber
Greenstein	Jay	D	
Koretz	Paul		N001119

Agency Name	Form Type
Exposition Metro Line Construction Authority	Annual

- 4** Click on “View Report” to view, in real time, a pdf version of any Statement that has been filed electronically. The moment a filer’s Statement/Report has been submitted, it is time stamped and considered filed.
- 5** To locate the Statement you wish to view, look for the Form Type (e.g. Annual, Assuming, Leaving). In this case, the filer’s *Annual* Statement is ready for viewing.

## Reports

The Reports section allows you to generate a report of Received or Pending Statements of Economic Interests (SEIs) by Form Type (e.g. Annual, Assuming Office, Leaving Office) and by year.

1 Select Filing Year: 2015

2 Select Roster you Wish to View: ☒ Filers (EO) ☐ Filers

3 Type of SEI: ☐ Annual ☒ Assuming ☐ Leaving

4 Status: ☒ Received ☐ Pending

5 [Run Report](#)

- 1 Select Filing Year – Choose the down arrow to toggle between years.
- 2 Select Roster You Wish to View - Select the group of filers for which you wish to generate a report
  - Selecting **Filers (EO)** will display a list of only those filers of your agency who submit their original Form 700s to the Executive Office of the Board of Supervisors
  - Selecting **Filers** will allow you the ability to generate reports that a list of filers in your agency who submit their original Form 700s to you
- 3 Type of SEI – Select the type of SEI you wish to generate a report for
- 4 Status – Choose between Received or Pending Statements
- 5 Click “Run Report” to view the criteria you selected in a report form

Last Name	First Name	MI	EmployeeNumber	Date Received
Testor	John		N000712	
Total Filers: 1				
<a href="#">Export to Excel</a>				

Once you have run a report, you can click “Export to Excel” to export the data to a printable document

## Documents

This section will provide you with the capability to upload and store miscellaneous documents related to each filer on your roster. To add a document, follow these steps:

### Uploading Documents - Step One

Choose the profile where you would like to store your document by clicking on the arrow next to the filer's name.

Dashboard Agency Contact Roster e-Filers Reports Documents

Select Filing Year: 2015

Last Name	First Name	Position	County Emp.	Division
Anderson	Jane	Member, School Board		
Andrade-Stadler	Adele	Member, School Board		
Garcia	Don	Member, School Board	True	
Gin	Robert	Member, School Board		
Nixon	Richard	Superintendent	True	
Rodriguez-Mackintosh	Patricia	Member, School Board		
Russell-Chavez	Joanne	Member, School Board		
Tellez-Gagliano	Laura	Superintendent		

### Uploading Documents - Step Two



To upload a document, click on the green plus sign next to

Add New File

Dashboard Agency Contact Roster e-Filers Reports Documents

Select Filing Year: 2015

Last Name	First Name	Position	County Emp.	Division
Anderson	Jane	Member, School Board		

 Add New File
  Refresh

	File Name	Form Type	Created Date
<a href="#">View File</a>	Chief Board Services 11-18-15.pdf_AF44996.pdf	Miscellaneous	12/08/15
<a href="#">View File</a>	87200 Filers Assuming Office.pdf_AF44996.pdf	Miscellaneous	12/08/15
<a href="#">View File</a>	87200 Filers Leaving Office.pdf_AF44996.pdf	Miscellaneous	12/08/15
<a href="#">View File</a>	AF101-20151208085915_AmendmentUpload.pdf		12/08/15
<a href="#">View File</a>	AF100-20151208080624_AmendmentUpload.pdf		12/08/15
<a href="#">View File</a>	AF44996_AnnualFilingUpload.pdf	Form700	12/08/15

Andrade-Stadler	Adele	Member, School Board		
Garcia	Don	Member, School Board	True	



## Uploading Documents - Step Three

Identify the type of file you wish to upload (i.e. Form 700, Amendment or Miscellaneous Item)

Select Filing Year: 2015

Last Name	First Name	Position	County Emp.	Division
Anderson	Jane	Member, School Board		

[Add New File](#) [Refresh](#)

File Name	Form Type	Created Date
-----------	-----------	--------------

Select File Type: Form 700

This Filer has no file.

▶	Gin	Robert	Member, School Board	
▶	Rodriguez-Mackintosh	Patricia	Member, School Board	
▶	Russell-Chavez	Joanne	Member, School Board	
▶	Stadler	Adele	Member, School Board	False
▶	Tellez-Gagliano	Laura	Superintendent	

## Uploading Documents - Step Four

Once you have selected your file type, click on  to browse through your computer files and locate the document you wish to upload.

Dashboard Agency Contact Roster e-Filers Reports Documents

Select Filing Year: 2015

Last Name	First Name	Position	County Emp.	Division
Anderson	Jane	Member, School Board		

[Add New File](#) [Refresh](#)

File Name	Form Type	Created Date
-----------	-----------	--------------

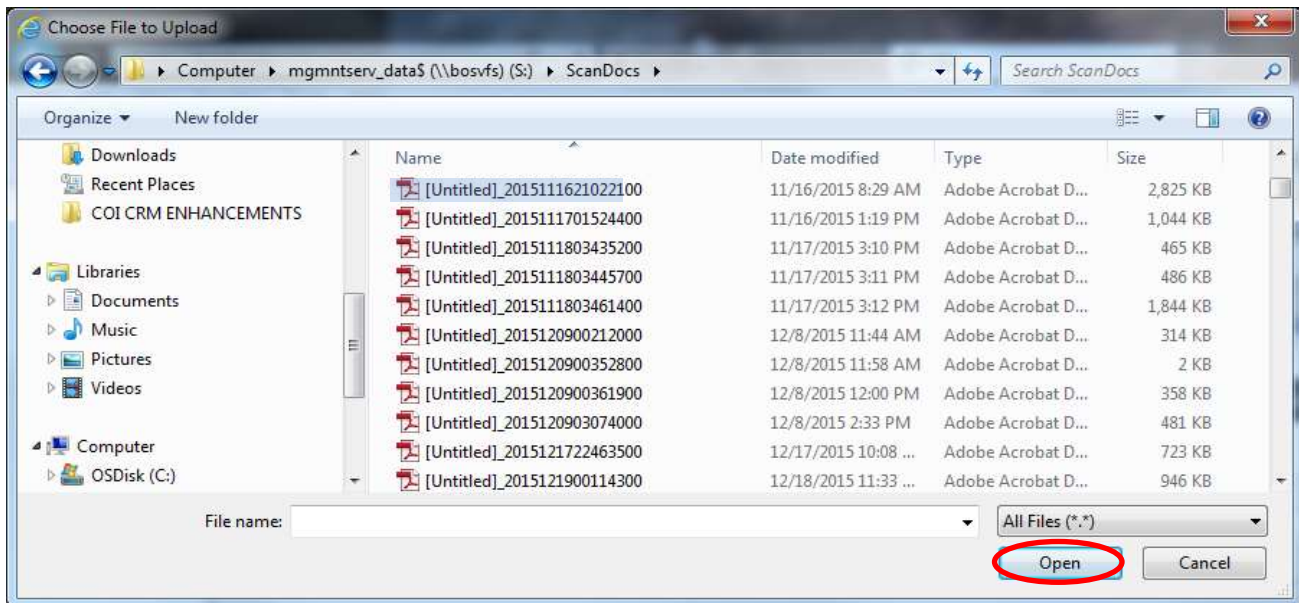
Select File Type: Miscellaneous

View File	Chief Board Services 11-18-15.pdf_AF44996.pdf	Miscellaneous	12/08/15
View File	87200 Filers Assuming Office.pdf_AF44996.pdf	Miscellaneous	12/08/15
View File	87200 Filers Leaving Office.pdf_AF44996.pdf	Miscellaneous	12/08/15
View File	AF101-20151208085915_AmendmentUpload.pdf		12/08/15
View File	AF100-20151208080624_AmendmentUpload.pdf		12/08/15
View File	AF44996_AnnualFilingUpload.pdf	Form700	12/08/15

## Uploading Documents - Step Five

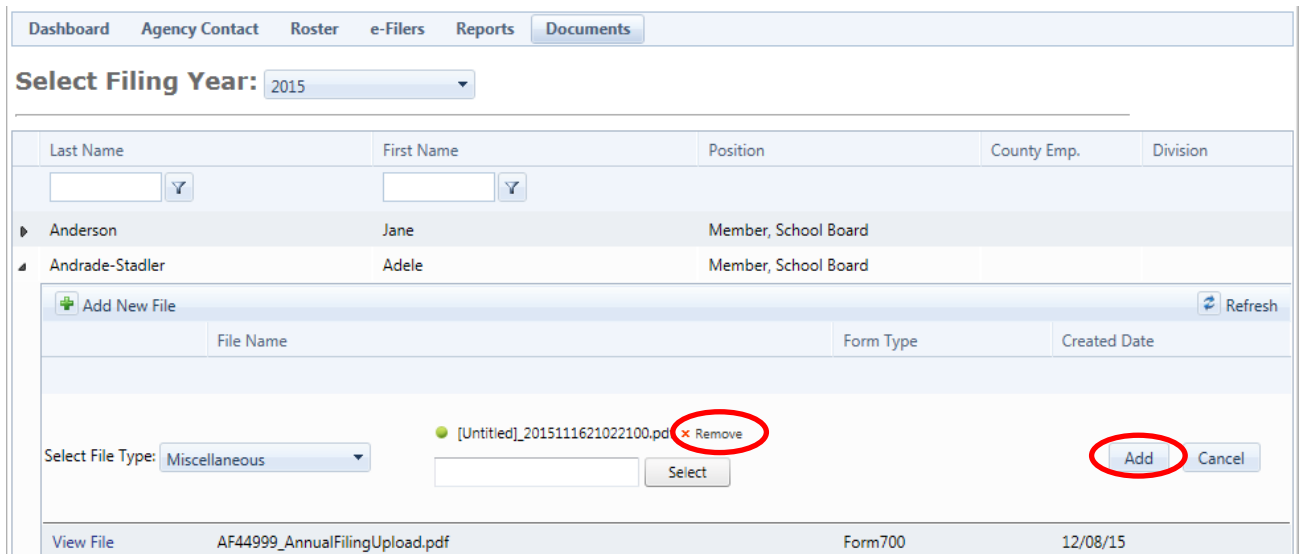
Highlight the document you wish to upload and click on

Open



## Uploading Documents - Step Six

The document will be temporarily held in queue until you click on **Add** to permanently add the document to your filer's profile. Click **Remove** if you decide you do not want to upload the document after all.



## Viewing Documents – Step One

Choose the profile from which you would like to retrieve a document by clicking on the arrow next to the filer's name

Dashboard Agency Contact Roster e-Filers Reports **Documents**

Select Filing Year: 2015

Last Name	First Name	Position	County Emp.	Division
<input type="text"/> ▼	<input type="text"/> ▼			
▶ Anderson	Jane	Member, School Board		
▶ Andrade-Stadler	Adele	Member, School Board		
▶ Garcia	Don	Member, School Board	True	

## Viewing Documents – Step Two

To view a document, click on [View File](#)

Dashboard Agency Contact Roster e-Filers Reports **Documents**

Select Filing Year: 2015

Last Name	First Name	Position	County Emp.	Division
<input type="text"/> ▼	<input type="text"/> ▼			
▲ Anderson	Jane	Member, School Board		
<a href="#">Add New File</a> <a href="#">Refresh</a>				
	File Name	Form Type	Created Date	
<a href="#">View File</a>	Chief Board Services 11-18-15.pdf_AF44996.pdf	Miscellaneous	12/08/15	
<a href="#">View File</a>	87200 Filers Assuming Office.pdf_AF44996.pdf	Miscellaneous	12/08/15	
<a href="#">View File</a>	87200 Filers Leaving Office.pdf_AF44996.pdf	Miscellaneous	12/08/15	
<a href="#">View File</a>	AF101-20151208085915_AmendmentUpload.pdf		12/08/15	
<a href="#">View File</a>	AF100-20151208080624_AmendmentUpload.pdf		12/08/15	
<a href="#">View File</a>	AF44996_AnnualFilingUpload.pdf	Form700	12/08/15	

## Need Assistance?



For assistance with the use of Los Angeles County Electronic Roster System, please use the following contact information:



Email: [COI-Desk@bos.lacounty.gov](mailto:COI-Desk@bos.lacounty.gov)  
T: 213-974-1748



Nansi Buenrostro



Therese Yopez



Andrea Petty